

Prosperity Connection Position Description

Position Title: Lead Financial Coach

Status: Non-Exempt

Position reports to: Director of Coaching

Position supervised: None

Job Summary:

The Lead Financial Coach (LFC) serves as an expert in financial coaching and mentor to coaching staff and fellows. The LFC is a key representative of Prosperity Connection with stakeholders and clients.

Primary responsibility of the LFC is to provide one-on-one financial coaching services and helps to mentor fellows. Additionally, the Lead Coach will help to organize and implement financial education seminars in tandem with the St. Louis Builds Credit initiative, aid in community outreach efforts with local partner organizations, and track client demographics and outcomes.

Evenings and weekends may be required on an as-needed basis in order to fulfill community outreach and client commitments. The employee will also exercise discretion and independent judgment with respect to matters of significance.

Essential Functions:

1. Provides one-on-one financial coaching with the goal of encouraging and promoting positive financial behavior and outcomes. LFC will help clients identify and assess their personal financial needs, establish goals, develop action plans, and track successes.
2. Acts as a mentor to fellows and serves as a basis of knowledge to the team.
3. Responsible for ensuring timely input of client data into the Salesforce data management platform. Works cooperatively with the Director of Operations to guarantee accurate reporting.
4. Ensures client satisfaction as a priority of Prosperity Connection financial coaching.
5. Duties include staffing outreach events as needed.
6. Understands and complies with all state and federal regulations and laws. Ensure compliance with all governing regulations especially the Bank Secrecy Act requirements. Bank Secrecy Act knowledge will be determined by the employee's position and responsibility.

Preferred Experience and Qualifications:

- Two to four years of progressive experience related to client facing service.
- Understanding of community development, project management, communications, and organizational dynamics.
- Enthusiasm for serving others and the community is a must.
- Ability to establish rapport and interact confidently and effectively with diverse individuals on all social and economic levels.

- Superior written and verbal communication skills, exceptional attention to detail, and must be able to master the use of Microsoft Office applications (Word, Excel, Teams, Outlook, SharePoint, OneDrive). Experience in Salesforce is a plus.
- Candidate should be professional in behavior and appearance, show initiative, be detail oriented, be willing to work a flexible schedule, and have the ability to work independently or in a team environment.

To apply for the opportunity, please send resume and cover letter to Camille Branch at employment@prosperityconnection.org

Physical Requirements:

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The physical requirements of this job include the ability to stand/sit, walk, reach above shoulder level, data entry, crouch, bend, stoop, kneel, squat, crawl and carry/lift up to 35 pounds. The employee must have valid driver's license and have his or her own personal transportation.

Salary Range: \$48,000 - \$55,000